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Demographic Change & Recreational Activity Trends

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WHAT THIS PRESENTATION COVERS

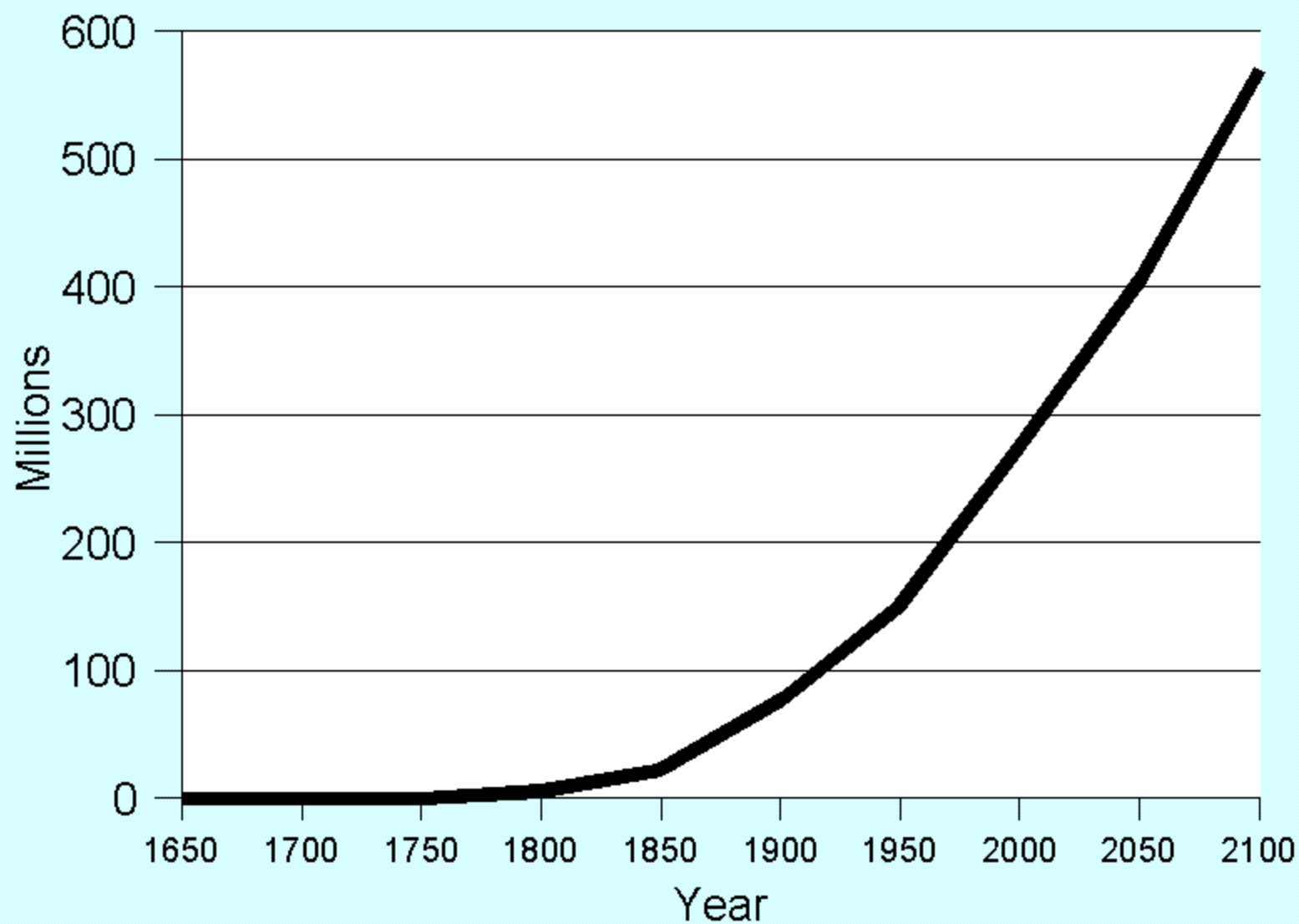
- **Population Growth & Demographic Diversification**
- **Boating Participation**
- **Trends**
- **Segmentation**
- **Risk-Orientated Activities & Recreational Conflicts**



DEMOGRAPHIC CHANGE:

**Know the Trends &
Better Anticipate
Market Shifts**

U.S. Population Growth



Our Changing American Society

➤ **1 million** new legal immigrants per year

➤ More people: 1990 248 mm

2020 325 mm

2050 404 mm

2100 571 mm

➤ Getting older: Median age 35 ® 38 (2020)

➤ Changing ethnicities by 2050:

Anglo Americans 76% ® 50%

African Americans 12% ® 15%

Hispanic Americans 9% ® 21%

Asian Americans 4% ® 11%

Demographic Percentages: 1960 & 2000

Family Income (1998\$s) (N.B:45 million U.S. families in 1960,almost 75 million families in 2002)

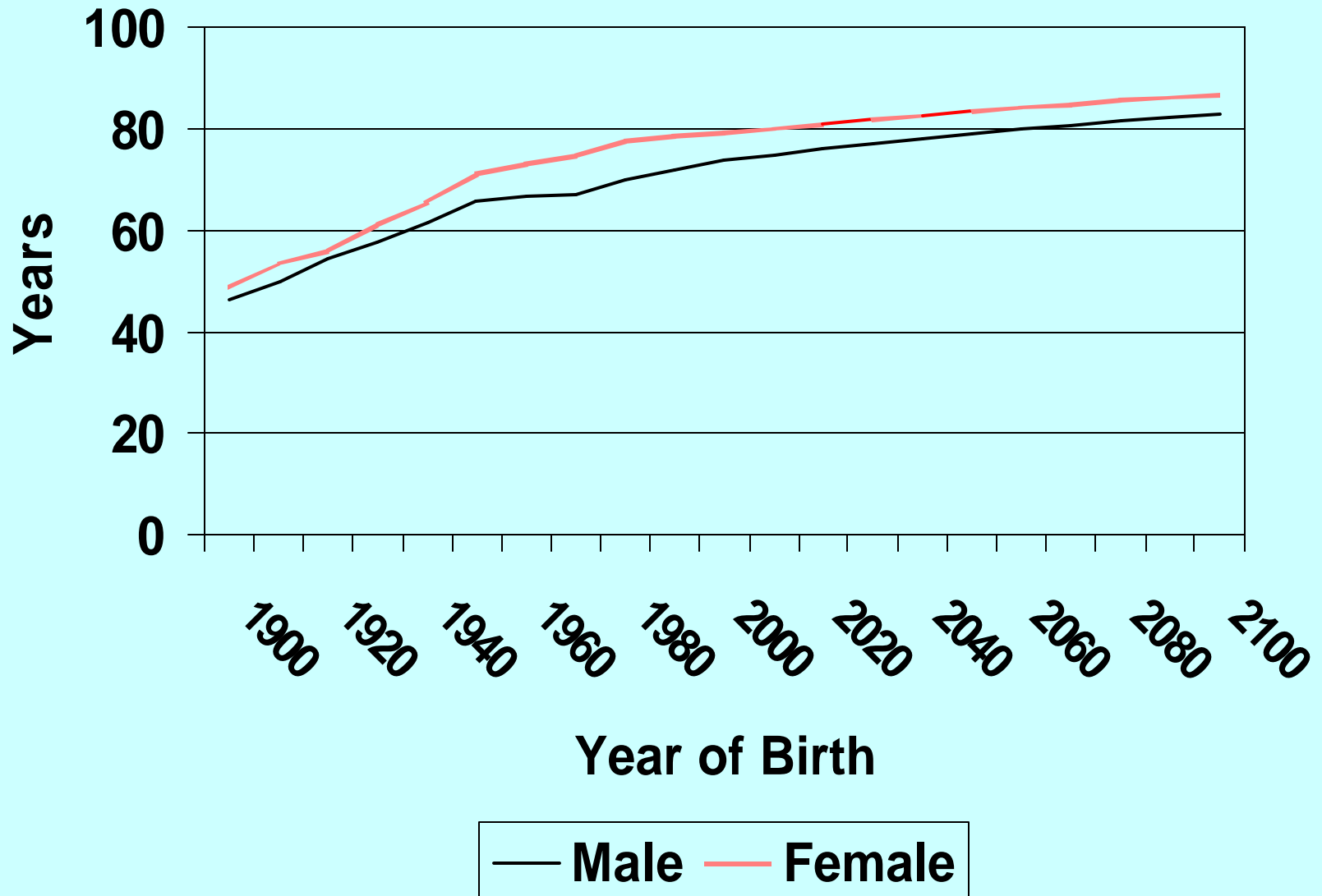
<u>Percentiles</u>	<u>1960</u>	<u>2000</u>
20 th	\$14,093	\$21,600
40 th	\$24,298	\$37,692
60 th	\$32,215	\$56,020
80 th	\$44,547	\$83,693
95 th	\$68,521	\$145,199

Demographic Percentages: 1960 & 2000

Educational Attainment, (Age 25 & Over) **Percent**

<u>Education level</u>	<u>1960</u>	<u>2000</u>
8th grade or less	37.5	7.4
9-11th grade	18.5	9.7
High school graduate	27.1	33.8
Some college	9.1	24.7
College degree or higher	7.7	24.4

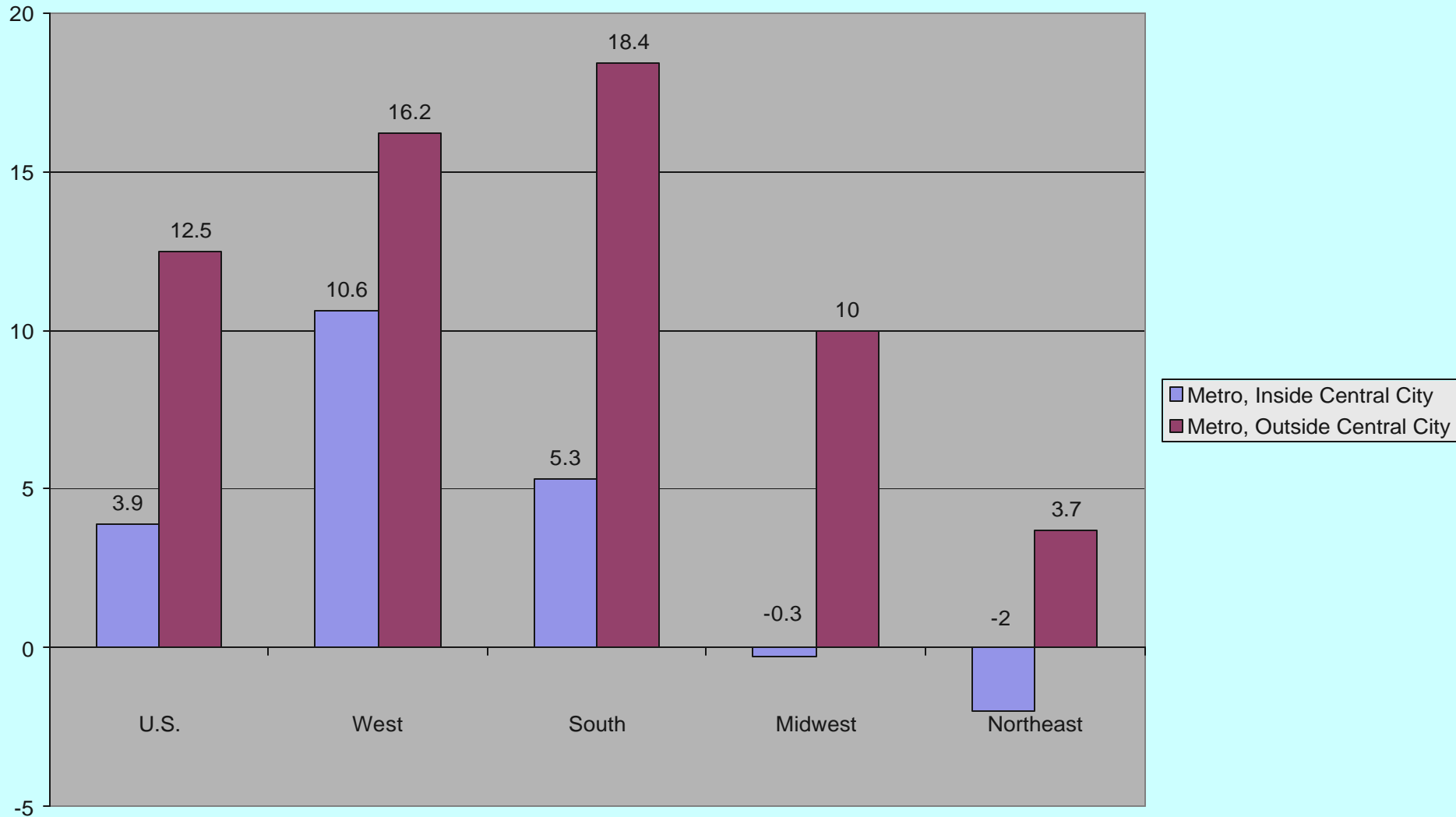
Life Expectancy

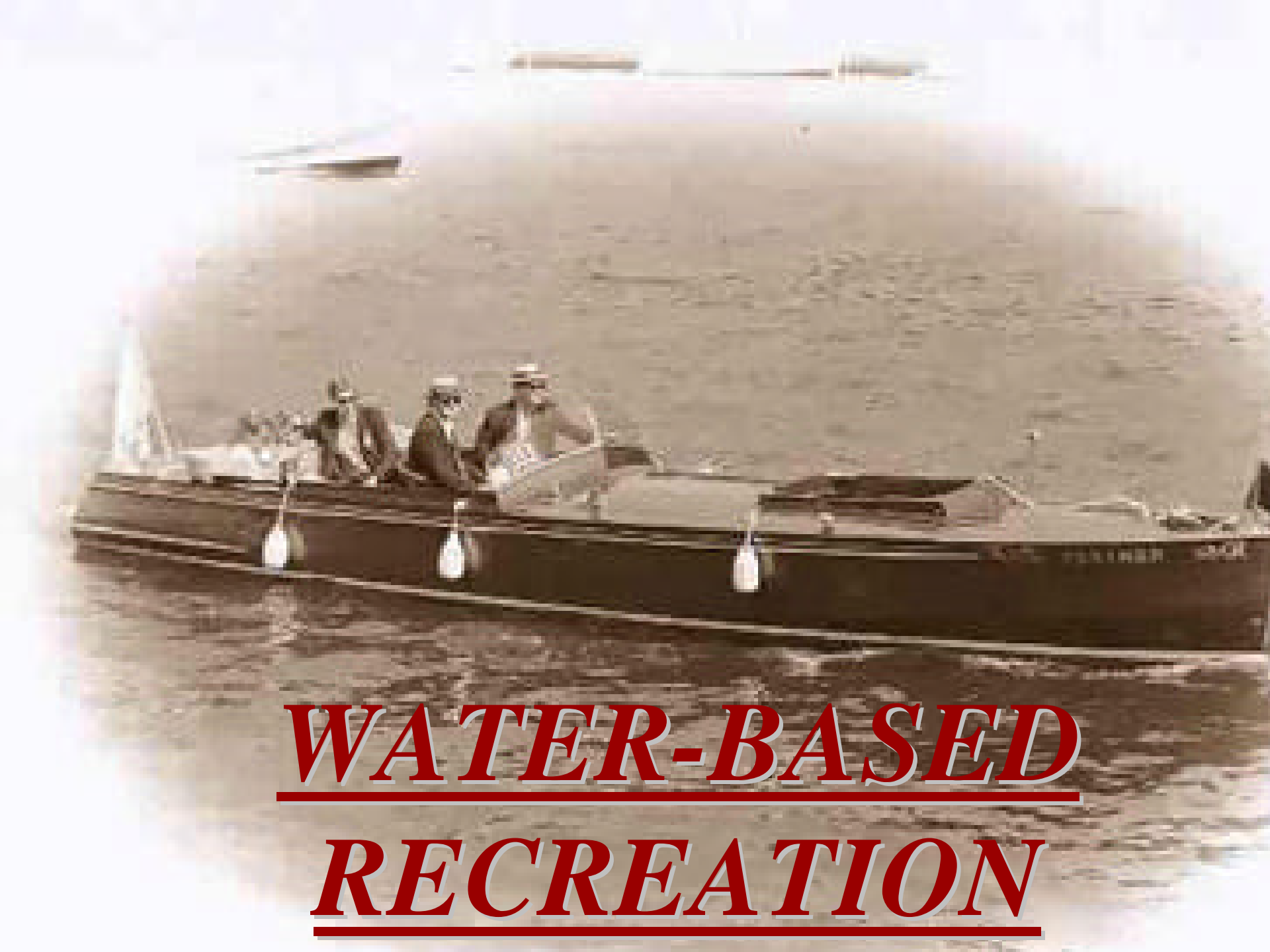


Where People Live (% of Population)

Description of Area	U.S. n=4988	North n=2098	South n=1342	Rockies n=932	Pacific n=616
Established downtown area	9.2	9.7	8.6	8.6	9.6
Established older residential area near downtown	24.9	26.5	20.7	22.0	31.2
Established newer residential area	14.5	14.3	13.9	17.9	12.7
Newly developing area where building is active	9.9	7.6	11.8	11.5	11.0
New residential & pre-existing rural house /farms	16.9	17.9	17.6	15.3	14.7
Rural area with little new development	21.1	20.0	24.1	21.4	18.3
Don't know	3.5	4.0	3.3	3.3	2.5
Total	100.0	100.0	100.0	100.0	100.00

**Percentage Change in Metro Populations Inside and Outside
of Central Cities: 1990 to 1998**





WATER-BASED
RECREATION

Participation 2003

Activity	Millions of participants	%
Any Boating	76.1	35.7
Motor Boating	51.8	24.3
Sailing	12.2	5.7
Jet Skiing	20.3	9.5
Rafting	22.6	10.6
Kayaking	9.6	4.5
Rowing	8.9	4.2
Canoeing	19.6	9.6

Average Participation & By Days

(%)

Activity	Avg Days	1-2 Days	3-10 Days	11-25 Days	25-50 Days	51+ Days
Motor Boating	13.5	28%	43%	16%	8%	5%
Sailing	8.4	47%	38%	9%	4%	2%
Jet Skiing	9.6	39%	40%	13%	6%	2%
Kayaking	7.7	50%	36%	8%	4%	2%
Rowing	4.0	50%	38%	7%	3%	2%
Canoeing	7.7	46%	42%	8%	3%	1%

Participation % By Setting 2003

Activity	Users Millions	Both	Fresh water	Salt water
Motor Boating	51.8	12%	70%	17%
Sailing	12.2	13%	38%	48%
Jet Skiing	20.3	9%	72%	18%
Kayaking	9.6	12%	55%	31%
Rowing	8.9	5%	86%	8%
Canoeing	19.6	5%	88%	6%

Participation By Other Settings (%)

Activity	Coastal	Forest	Grass Land	Farm Lands	Urban/ Sub- Urban
Kayaking	47%	9%	5%	2%	3%
Canoeing	8%	10%	5%	2%	6%

Participation By Vicinity (%)

Vicinity (Near Home)	Fresh Water Activities	Salt Water Activities
Home – Yes	58%	64%
Home - No	40%	35%

Vacation Boating & Renting vs Owning

	Vacation Around Freshwater (%)	Vacation Around Saltwater (%)
Boating – Yes	42%	22%
Boating - No	58%	78%

	Vacation Around Freshwater (%)	Vacation Around Saltwater (%)
Rent a Boat	32%	41%
Own a Boat	61%	51%

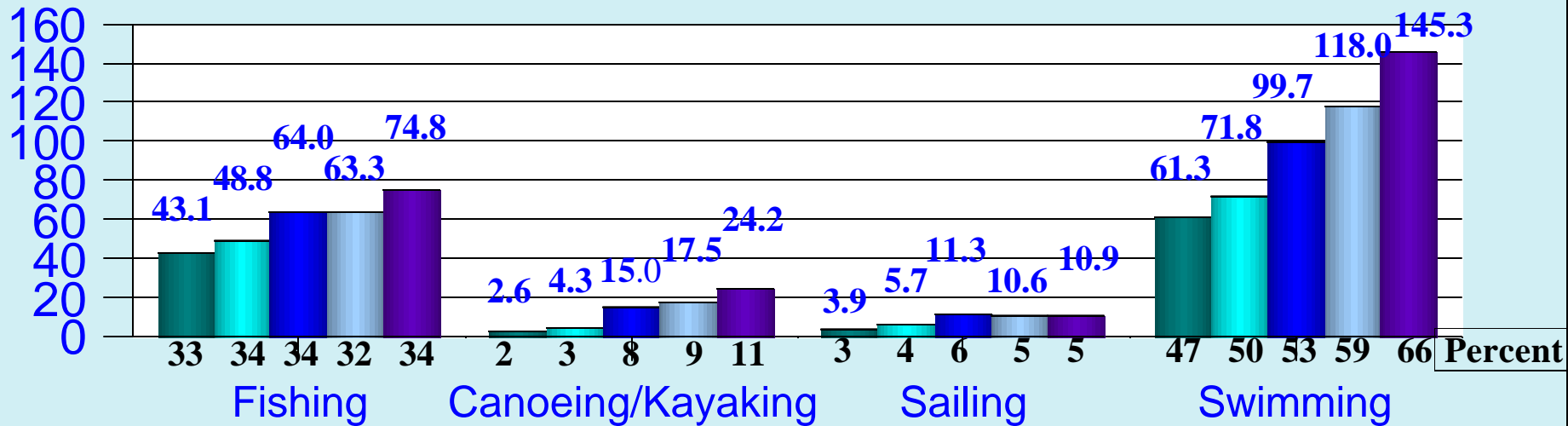


TRENDS

Long-Term Trends - Water

(12 or older)

Millions Participating



1960 (131 million)

1965 (144 million, 10% more)

1982-83 (188 million, 44% more)

1994-95 (216 million, 65% more)

1999-2000 (220 million, 68% more)



Activities Adding the Most Participants 16 or older, 1982-2003

	<u>Millions</u>	
	<u>Growth</u>	<u>No. in 2003</u>
Walking	85.4	179.0
Bird watching	50.0	71.2
Hiking	48.4	73.1
Swimming/river, lake, or ocean	36.4	92.9
Sightseeing	32.7	114.0
Picnicking	31.8	116.6
Bicycling	27.4	83.9
Developed camping	22.8	52.8
<u>Motor boating</u>	17.8	51.8
Off-road driving	17.3	36.7

PARTICIPATION TRENDS IN THE UNITED STATES

Activity	Millions of participants 1994-95	Millions of participants 2000-03	% change 1994-2003
<u>Kayaking</u>	<u>2.58</u>	<u>9.6</u>	<u>272.10</u>
Snowboarding	4.43	10.53	137.70
<u>Jet skiing</u>	<u>9.26</u>	<u>20.31</u>	<u>119.33</u>
View/photo fish	26.82	53.06	97.84
Snowmobiling	6.95	11.81	69.93
View wildlife	61.11	95.26	55.88
Backpacking	14.80	22.76	53.78
<u>Rafting</u>	<u>14.88</u>	<u>22.6</u>	<u>51.88</u>
Day hiking	46.68	70.62	51.29

PARTICIPATION TRENDS IN THE UNITED STATES

Activity	Millions of participants 1994-95	Millions of participants 2000-03	% change 1994-2003
<u>Canoeing</u>	<u>13.76</u>	<u>19.6</u>	<u>42.44</u>
<u>Coldwater fishing</u>	<u>20.27</u>	<u>28.81</u>	<u>42.13</u>
Developed camping	40.53	55.73	37.50
Drive off-road	27.26	37.21	36.50
Walk for pleasure	130.66	177.00	35.47
Visit nature centers	90.93	122.28	34.48
Family gathering	120.97	156.78	29.60
View birds	52.83	69.26	31.10
<u>Motor-boating</u>	<u>47.0</u>	<u>51.8</u>	<u>10.2</u>

Projected Demand to

Activities	Millions Participating (1995)	2020 Indexed % Change (Base year is 1995)		
		People	Days	Trips
<u>Water-Based</u>				
Going to the Beach	124	1.24	1.17	1.17
Motor Boating	47	1.21	1.14	1.16
Swimming	78	1.21	1.12	1.09
Fishing	58	1.17	1.17	1.10
Canoeing	14	1.15	1.28	1.14
Rafting/Floating	15	1.07	1.17	1.10
<u>Winter-Based</u>				
Cross-Country Skiing	6	1.26	0.96	1.12
Downhill Skiing	17	1.22	1.31	1.36
Snowmobiling	7	1.09	1.32	1.35

FASTEST GROWING

Kayaking

Snowboarding

Jet skiing

View or
photograph fish

Snow-mobiling

Ice Fishing

Sledding

View wildlife

Backpacking

Day hiking

Bicycling

Horseback riding

Canoeing

Mountain climbing

Coldwater
fishing

Developed
camping

Drive off-road

Rafting

Walk for pleasure

Surfing

Visit nature
centers

Visit arch. sites

View birds

Family gathering

SLOWEST GROWING

Motor-boating

Primitive camping

Sailing

Visit historic sites

Downhill skiing

Snorkeling/ scuba

Visit beach/waterside

Anadromous fishing

Caving

Small game hunt..

Migratory bird
hunting

Picnicking

Warm-water fishing

Saltwater fishing

Swimming



SEGMENTATION OF BOATERS

Canoers

- 43% female, 57% male
- 87% non-Hispanic white
- 33% under 25,
77% under 45
- Incomes \$25K to \$75K
- Under 80% urban
- Favored by Northeasterners
& Midwesterners

Kayakers

- 44% female, 56% male
- 85% non-Hispanic white
- 60% under 35, 40% under 25
- Over 1/3 earn under \$25K
- 85% urban
- Heavier participation in New England & Pacific Coast States

Motor Boaters

- 57% male, 43% female
- 52% between \$25K & \$75K
- 77% urban
- Favored in the Lake, Midwest & South Atlantic states
- 58 % between 25 & 55

Personal Water Craft

- 54% male, 46% female
- 79% white, 11% Hispanic
- 66% under 35
- Favored in the Midwest & South

Estimated ratios of percentage of participants to percentage of total population for outdoor activities by race & country.

Group	Sailing	Canoeing	Kayaking	Motor Boating	Rowing	Jet Skiing
Percent of Total Population	5.7	9.6	4.5	24.3	4.2	9.5
Race/Ethnicity						
White	1.19	1.27	1.22	1.25	1.19	1.17
Black	0.57	0.28	0.23	0.32	0.40	0.49
American Indian	0.86	1.29	0.86	1.00	1.14	1.14
Asian/ PI	0.85	0.79	1.76	0.56	1.03	0.82
Hispanic	0.54	0.41	0.48	0.52	0.65	0.71
Place of Birth						
United States	1.04	1.06	1.05	1.06	1.03	1.06
Another Country	0.56	0.34	0.46	0.38	0.70	0.32

Estimated ratios of percentage of participants to percentage of total population for outdoor activities by age & income.						
Group	Sailing	Canoeing	Kayaking	Motor Boating	Rowing	Jet Skiing
Percent of Total Population	5.7	9.6	4.5	24.3	4.2	9.5
Age						
16-24	1.40	1.60	1.85	1.23	1.60	2.27
25-34	1.04	1.09	1.17	1.14	0.90	1.24
35-44	1.05	1.20	1.02	1.16	1.15	1.00
45-54	1.09	0.96	0.87	0.98	0.99	0.57
55-64	0.81	0.55	1.76	0.83	0.72	0.27
65+	0.47	0.29	0.48	0.53	0.39	0.12
Income						
<\$15,000	0.42	0.47	0.54	0.49	0.58	0.55
\$15,000-\$24,999	0.44	0.60	0.45	0.63	0.65	0.50
\$25,000-\$49,000	0.77	0.94	0.78	0.96	0.89	0.91
\$50,000-\$74,999	1.04	1.18	1.02	1.17	1.10	1.12
\$75,000-\$99,999	1.44	1.36	1.56	1.26	1.37	1.41
\$100,000+	2.43	1.52	2.18	1.50	1.63	1.70

Regions Where Participants Reside

Type of Activity	Millions of Participants				National
	South	North	Rocky Mtn./ Great Plains	Pacific Coast	
Trail/street/road	59.6	82.6	15.7	30.4	188.4
Viewing/learning	44.5	66.2	12.4	23.1	146.1
Camping	18.5	27.4	7.5	12.4	66.5
Hunting	8.8	9.6	2.9	2.1	23.7
Outdoor adventure	35.2	50.5	11.1	19.8	117.0
<u>Boating/floating</u>	<u>23.6</u>	<u>35.3</u>	<u>6.7</u>	<u>10.8</u>	<u>76.5</u>
Fishing	26.8	29.2	6.7	9.1	72.4
Swimming	40.1	57.6	9.2	21.2	127.4
Ski/sled/snowmobiling	8.9	31.9	5.2	8.3	54.4
Outdoor team sport	14.6	21.3	3.9	7.4	46.9
Social activities	53.3	74.6	14.4	27.6	169.9

***BEING MORE
EFFECTIVE IN
OUTREACH,
LISTENING, &
INFORMING***

Hunt-n-Fish Men's Motor Club (6.3%)



- Hunt, fish, motorized, camp, **motorboat (53%), canoe**
- No beach activities or much viewing/learning
- 88% male, 90% white, under 45, U.S. born, much more rural, Prairie & Southern
- Belong to wildlife conservation group, read nature magazines, woodworking, own a business, garden, have pets & do home improvements

The Urban Beach Boys (3.8%)

- ⌘ Surfing, Snorkeling, **Kayaking**, Backpacking, **Sailing**, Snowboarding, Saltwater Fishing, **Water Skiing**, **Jet Skiing**. more active than most people in most activities, except hunting
 - ⌘ 2/3's white, Asian/Pacific Islanders well represented, majority <35, U.S. born & urban
 - ⌘ South Atlantic & Pacific Coast
 - ⌘ Regularly go to movies, use internet at home, participate in environmental groups, invest, & attend classes, youth volunteers, into the arts
- 

Young New England Wind Surfers (0.9%)



- ▲ Windsurfing (71%), surfing, kayaking (68%), sailing (68%), non-motorized winter activities, snorkeling, rowing (28%) & canoeing (55%)
- ▲ More active than most Americans in all activities, including water & jet skiing
- ▲ >85% white; 2/3's male; ½ under 25; urban, U.S. born
- ▲ New England & Pacific Coast very represented
- ▲ Lifelong learning classes, participate with environmental groups, regularly attend movies, use country clubs, internet & into stock market






The Noreaster Musclers (6.2%)

- o Cross-country skiing, **rowing (31%), kayaking (28%), canoeing (53%)**, skiing, **sailing (25%)**, hiking, backpacking, snowboarding, bicycling & fishing
- o Don't hunt, but active in most other activities
- o Slightly more male than female, white & Asian/Pacific Islander, young to middle aged, urban, from New England, Prairie, Mountain & Pacific states
- o Members of conservation groups, use internet at home, attend concerts, have vacation property, invest, belong to country club

Risk-Orientated Activities & Recreational Conflicts

Shifts in Outdoor Recreation Markets


- Technology innovations are making more areas, more accessible:
 - Jet boats
 - Light-weight gear
 - Sub-zero sports clothing
 - Sticky climbing shoes
 - Night scopes
- Risk/Adventure pursuits are gaining in popularity:
 - Base jumping
 - Falls shooting
 - Mountain boarding
 - "Jet skiing"
- Traditional outdoor activities still growing (moderately); consumptive activities declining; viewing/learning activities on the rise.

Risk-Orientated Activities


- **Jet-skiing, White-water boating, scuba, Technology's changing way people recreate**
- **>growth in risk activities & risk seekers**
- **Water-based sports equal male & female**
- **Mid income, 4 yrs college/masters degree**
- **Prefer remote, natural places, soloists**
- **Dislike man-made comforts or services**


The Thrill Seekers (8.3%)



 Waterskiing (62%), jet skiing (68%), rafting (46%), snowmobiling, snowboarding, driving off-road, motorboating (83%), skiing, rowing & canoeing

 Very active across a large number of activities

 Equally male/female, white & American Indians well represented, two thirds under 35, almost all born in the U.S., from Plains states

 Youth volunteers, belong to a country club, use the internet, attend movies, watch sports on TV, gather with friends & neighbors

Risk Orientated Activities

Activity	Participants Millions	White Water
Kayaking	9.6	20%
Canoeing	19.6	15%
Rafting/ Tubing	22.6	26%

Recreational Conflicts

- **Asymmetrical**
- **Goal interference**
- **Traditional vs. new technological activities. Technology = > conflict**
- **Traditionalists perceive more conflicts**

Recreational Conflicts

- **Activity style**
 - **Generalist to Specialist**
- **Resource specificity**
 - **Traditionalist's have greater environmental concerns**
- **Mode of experience**
 - **Unfocused to focused**

Recreational Conflicts

- **Lifestyle tolerance**
 - **Associated with beliefs about particular groups or users**
 - **Rather than visible behaviors**
- **Concerns with safety**
 - **Recklessness = perceived threats**

Conflict Resolution

- **Increase importance of resource**
- **Increase place attachment**
- **Educating/Awareness**
 - **Goals of different users**
 - **Etiquette, acceptable behavior**
- **Mgt Zoning – for different activities**

Summary Points

- Society is changing dramatically, & it shows up in our outdoor recreation
- Outdoor recreation is growing & diversifying as a part of Americans' lifestyles
- Walking, birding, hiking, swimming are at the top of the activity growth list, not far behind is motor boating & water activities

Summary Continued

- Population is rapid growing & some groups will literally explode in numbers
- Greater women, Asian/Pacific Islander, Hispanic, older & urban people participating. OR is still very much a white male pursuit
- Indicators point to rise of outdoor recreation & more demands on water resources
- Need to be smart about outreach & education strategies – Know your market
- Trends in risky activities & conflicts



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